

About the Monitor Institute by Deloitte

Monitor Institute by Deloitte works with social impact leaders to help surface and pioneer "next" practices—breakthrough approaches for societal challenges. As part of Monitor Group and now at Deloitte, the team has catalyzed progress on some of the pressing issues of our time.

Offerings and focus areas ~ Monitor Institute by Deloitte’s impact-first approach means that opportunities to work with clients and develop thought leadership are pursued based on their potential to surface and spread innovative approaches to addressing societal issues. When we first started as part of the Monitor Group in Cambridge, Massachusetts in 2005, this involved working exclusively with philanthropy and social sector organizations; increasingly this includes companies and those in the public sector who are also focused on these issues. Since becoming part of the largest global network of professional services member firms, Monitor Institute by Deloitte can now pair its understanding of social change with Deloitte’s change management, analytics, and digital capabilities to meet a wider array of clients' needs in the following focus areas:

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Monitor Institute by Deloitte (MID)

Stakeholder(s):

Social Impact Leaders

Monitor Institute by Deloitte Team :

We bring a passion for progress and deep expertise in social change. Monitor Institute by Deloitte's multidisciplinary team brings a diverse blend of cross-sector experience, and a balance of analytic capability with sensitivity to the workings of human systems.

Dana O'Donovan :

Managing Director ~ Dana is the Managing Director of Monitor Institute by Deloitte. Drawing on her twenty-five years as a social impact adviser, consultant, and nonprofit executive, she partners with the CEOs and leadership teams of national foundations, non-profits, and corporations to drive performance and maximize impact. Her work on issues of social impact strategy and implementation has been published in Stanford Social Innovation Review, The Chronicle of Philanthropy and Fast Company. Prior to becoming Monitor Institute's Chief Operating Officer in 2010, she led human assets strategy at Teach For America and started her career as a consultant at Monitor Group. Dana has served on many nonprofit, foundation and government boards. Currently, she serves on the North Carolina Council for Women, the North Carolina Aquarium Society Board, ADAP Capital Guidance Council, The University of North Carolina's Kenan Institute Board of Mentors and the Board of DREAMS of Wilmington. Dana graduated from The University of North Carolina—Chapel Hill where she was a Morehead-Cain Scholar.

Joanna Burleson :

Managing Director ~ Joanna works closely with social innovators and their organizations to scale their impact on some of society's most complex social challenges. She is a leader in Monitor Institute by Deloitte's Adaptive Strategy practice. She has deep expertise in education and workforce development and her work spans across all dimensions of social sector strategy, from visioning and growth planning to developing operating and economic models. Joanna's work builds on over a decade of strategic consulting experience across the corporate and social sectors, both in the US and abroad. She began her consulting career with Monitor Group and brings this experience to Monitor Institute by Deloitte, where she helps to tackle some of the most meaningful and important strategic problems facing the social sector today. Prior to her time with Monitor, Joanna worked at Charles River Associates, conducting complex economic and statistical analysis for antitrust litigation. She obtained her B.A. in Economics from the University of California at Berkeley and her MBA from the University of California at Los Angeles. She lives in Boston with her husband and three children.

Kerri Folmer :

Managing Director ~ Kerri advises organizations in the public, private, and social sectors as they strive to find innovative solutions to today's complex social and environmental challenges. She has over 20 years of experience leading organizations through transformational change, defining and adapting strategy, and developing new business models. Prior to joining Deloitte, Kerri was the chief of staff and strategy at the Gordon and Betty Moore Foundation, which gives her a deep understanding of the unique leadership and operational challenges of foundations and nonprofit organizations. Starting with a degree in psychology (State Diego State University) and graduate degree in business (Santa Clara University), Kerri has long been fascinated by the human will to create change, and its inherent complexities. Kerri and her two daughters, Toni and Shelby, live in the Bay Area and spend time together cultivating a large family garden, riding horses, and working out together at their favorite boxing gym.

Gabriel Kasper :

Managing Director ~ Gabriel has spent nearly two decades helping leading funders and nonprofits understand the changing context for their work and make sense of what those shifts will mean for both what they do and how they do it. He tracks emerging trends inside and outside the field and translates cutting-edge commercial innovation methods into new approaches for addressing pressing philanthropic and social-sector challenges. His work with funders at Monitor Institute by Deloitte is grounded in first-hand experience, both as the program officer for philanthropy at the David and Lucile Packard Foundation, where he was responsible for directing how the foundation used its resources to increase the effectiveness of philanthropy as a field, and as a manager of neighborhood programs at a local affiliate of the East Bay Community Foundation. He has more than 15 years of experience as a consultant, providing applied research, program design, and strategic advising services to foundations, nonprofits, corporations, and international agencies. He is a prolific writer and thinker about the future of philanthropy and new opportunity spaces in the social sector, having co-authored the Monitor Institute by Deloitte publications What's Next for Philanthropy: Acting Bigger and Adapting Better in a Networked World, On the Brink of New Promise: the Future of US Community Foundations, Intentional Innovation, and Working Wikily: Social Change with a Network Mindset. He has also published and spoken widely on topics including social media tools, diversity and identity-based philanthropy, social investing, and foundation collaboration. He is the designer and creator of several innovative tools for improving philanthropic practice, including the Strategy Landscape™ tool for visualizing foun-

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Stakeholders (continued)

dation funding flows and the Foundation Sidecar Funds platform for helping individual donors piggyback on the grantmaking choices of established foundations. He is a Phi Beta Kappa graduate of Wesleyan University and holds a master's in city planning from the University of California at Berkeley, where he was captain of the men's ultimate frisbee team.

Allan Ludgate :

Managing Director ~ Allan has dedicated his career to helping business, non-profit, and government leaders tackle their toughest problems and create impact in a dynamic world. This unifying theme in his work links together a highly diverse client portfolio, spanning grocery retailers, education non-profits, and beer companies. Allan finds his wide-ranging experience a plus, with the most powerful insights often coming from recognizing patterns and solutions that can travel from one domain to another. Within Monitor Institute by Deloitte, Allan leads our "Education Posse," a group of practitioners working to address one of our most vexing challenges—closing the education attainment gap for low-income youth. Allan's path began with jazz, when he picked up a B.S. in Jazz Studies (magna cum laude) and an M.B.A. in management (1st in class), both from New York University. He is a Wholistic Fitness master student, a lover of Boston sports teams, and the lucky husband of Maria and papa of Lucas and Isaac.

Tony Siesfeld, Ph.D. :

Managing Director ~ Dr. Tony Siesfeld works with organizations to grow value in dynamic environments and build the capability to deliver sustained impact. He has about 30 years of experience delivering for-profit and for-impact advisory work. Currently, he focuses on social action strategy, measurement and evaluation, and bringing leading practices developed in business to the social sector. His work has been noted in Harvard Business Review, Financial Times, SSIR and the Wall Street Journal. He has contributed to publications of organizations such as Sloan Foundation, the Brookings Institution, and the Organization of Economic Cooperation and Development (OECD). Tony holds a B.S. (summa cum laude) from the University of Vermont and, from Stanford University, an M.S. in Statistics and a Ph.D. in Psychology. Over the course of his career, Tony has worked as a farm hand, a special ed teacher, and in a garment factory. He comes from a family of teachers and activists.

Jasmine Arai :

Core Team Member ~ Jasmine serves as a thought partner for organizations during times of change, with over a decade of experience working with leaders to influence and drive systemic change within their organizations and across their industries. She has consulted for nonprofits and corporations to improve organizational effectiveness, create equitable talent development programs, and build diverse and inclusive cultures. Prior to joining the Monitor Institute, Jasmine worked in Deloitte's Human Capital practice focusing on organization and talent strategy for technology and life sciences clients. She is passionate about working collaboratively across industries and sectors to drive social change. Jasmine earned her BA from the University of Michigan and her MS from Northwestern University. Jasmine dedicates her time to supporting community organizations delivering positive impact in underserved communities. She volunteers in a variety of capacities with local nonprofits, working as a tutor, mentor, and career coach. Jasmine explores libraries in every country she visits, but she

enjoys trips to her neighborhood library in Los Angeles with her husband and son the most.

Sarah Brayton :

Core Team Member ~ Sarah is passionate about harnessing the power of stakeholders across the corporate, public, and non-profit sectors to solve complex social issues—particularly within workforce development and education. Sarah's background in consulting blends experience with clients across the private sector, higher education, foundations, and nonprofits on engagements relating to business model innovation, organic growth, and operating model design. She has also helped design, launch, and scale Deloitte initiatives including Courageous Principals, a three-day leadership training for public school principals, and Pathfinder, a workforce development program launched in collaboration with Salesforce. Sarah graduated with an MBA from the Kellogg School of Management where she was the Student Association President and graduated Magna Cum Laude from USC with a BA in Economics. Sarah lives in San Francisco and can often be found hiking, backpacking, and skiing in the surrounding area.

Bridget Brennan :

Core Team Member ~ Bridget has over 10 years of experience helping clients navigate complex projects and problems. She began her career working with clients on their globalization efforts through translation and localization; as a management consultant, Bridget has worked across Life Sciences, Insurance, and Technology, before eventually focusing on social impact topics. Bridget is passionate about the role and responsibilities of business, big and small, in society. She has worked with social entrepreneurs in the US and abroad and with multi-national corporations on their social impact efforts. She led Deloitte's collaboration with the first-ever World Humanitarian Summit, focusing on how the private sector can help address mounting humanitarian crises. She has also worked with a number of non-profits in the areas of health and human services and education. Bridget has an MBA with a concentration in Sustainable Enterprise and a certificate in International Development from The University of North Carolina Kenan-Flagler Business School. She lives in Chicago with her husband and son.

Katherine Dean :

Core Team Member ~ Katherine is passionate about diversity, civic engagement, and creating programs and processes to engage stakeholders in social change. She has a breadth of human capital experience—including performance management, change management, and persona/employee journey-mapping. Katherine has worked on several technology and organizational transformation projects across healthcare, higher education, and the non-profit sector. She has experience leveraging design thinking to identify stakeholder segments and create programs and processes that engage these stakeholders. Based in Atlanta, Georgia, and originally from the Washington, D.C. area, Katherine is a graduate of Emory University, where she studied International Relations and Economics. Katherine is also involved in inclusion and social responsibility efforts at Deloitte.

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Stakeholders (continued)

Danielle De Vera :

Core Team Member ~ Danielle is passionate about bringing opportunities and resources to underserved communities and she believes strongly that individual potential should not be constrained by circumstances. She's deeply curious about the social sector ecosystem and supporting cross-stakeholder efforts to increase impact. Growing up, Danielle was a beneficiary of education and housing nonprofits and government programs, an experience she deems pivotal in her current ability to understand and navigate the intricacies of serving and empowering those in need. She recognizes the great privilege she has in getting to now apply strategic and critical thinking to complex issues as a consultant with Monitor Institute by Deloitte. Danielle graduated from Stanford University with a degree in Management Science & Engineering. Prior to joining Deloitte, she did freelance writing for a foundation, worked on research & databases at Stanford GSB, and had a leadership role for an Ethiopia-based nonprofit focused on health and educational services for single- and double-parent orphans.

Rhonda Evans :

Core Team Member ~ As the co-lead of Monitor Institute by Deloitte's impact measurement program, Rhonda works with clients to design measurement and learning systems that help organizations grow their social impact. Rhonda has more than fifteen years of experience using data, research, and measurement to promote well-being. Previously, Rhonda served as the Director of Research of the for-profit start-up GoodGuide, a business that enabled consumers to make more informed buying choices. Rhonda was the co-founder of an applied research consultancy focused on health, environmental and working conditions issues whose work has been published in law and policy journals; mentioned in newspapers such as the New York Times, Los Angeles Times, and Guardian (U.K.); and, recognized on the floor of the United States Senate. Rhonda holds a social science Ph.D. from the University of California, Berkeley and was also a postdoctoral fellow and visiting scholar at UC Berkeley's Institute for Labor and Employment.

Heena Khoja :

Core Team Member ~ Hailing from a diverse Chicago neighborhood, Heena is passionate about improving outcomes for underserved populations and bridging race and gender divides. At Monitor Institute by Deloitte, she has focused on leveraging networks for social impact and developing solutions to improve graduation rates for low-income college students. Prior to joining the Monitor Institute team, Heena worked in Deloitte Consulting's Strategy and Analytics practice for three years on growth strategy, customer experience, and performance improvement efforts, primarily across the Life Sciences and Healthcare industry. Heena graduated magna cum laude from the Wharton School at the University of Pennsylvania with a BS in Economics, concentrating on management, marketing, and social impact, and a minor in Hispanic studies. She currently resides in Boston and spends her free time volunteering with Big Brothers Big Sisters, traveling, bingeing on television, and eating desserts.

Brendan Lehan :

Core Team Member ~ Brendan is driven by helping clients across sectors to develop strategies to achieve greater impact through direct growth and more effective collaboration. He has experience leading ecosystem and sensing-making projects to

explore complex topics at the intersection of social issues, and working with organizations to use innovative financing for social outcomes. His work focuses on challenges that span traditional boundaries of sector and issue area, including the future of food and agriculture and financial inclusion. He has worked with leading education organizations, health funders and multi-stakeholder collaboratives, among others, on issues ranging from operating model design to technology innovation and international growth. Brendan is a graduate of the Yale School of Management where he led the student impact investing program and co-authored research on how to encourage evidence-based practice in international development. He is a proud UMass Amherst alum and two-time City Year AmeriCorps member.

Justin Marcoux :

Core Team Member ~ Justin works with committed leaders to develop solutions that address pressing social issues. Since joining Monitor Institute by Deloitte, he has helped nonprofits as well as private, corporate, and community foundations challenge old assumptions and creatively imagine new possibilities. Justin also writes and speaks regularly about social innovation. He has co-authored articles including "The Re-emerging Art of Funding Innovation," which explores how foundations can better fund breakthrough social change, and "What's Next for Community Philanthropy," a look at the future of community foundations and other place-based funders. His work has appeared in publications such as the Stanford Social Innovation Review, the Chronicle of Philanthropy, and Alliance Magazine. Prior to joining Monitor Institute by Deloitte, Justin worked at Cambridge Associates advising foundations, nonprofits, and universities on investing their endowments. Justin holds an MBA from the Stanford Graduate School of Business, where he earned the Public Management and Social Innovation Certificate. He received his BA from Boston College with Phi Beta Kappa and Summa Cum Laude distinctions. Justin lives with his wife in San Francisco.

Tej Mehta :

Core Team Member ~ Tej is passionate about improving outcomes for vulnerable populations around the world and believes in harnessing the combined power of the private, public, and non-profit sectors to do so. He supports actors across the ecosystem in developing innovative business and operating models, enabling them to more effectively meet their impact objectives. Tej also co-leads Deloitte's efforts focused on supporting refugees and recently co-published A new home at work, a guide supporting employers in building a more inclusive workplace for their refugee employees. Prior to joining the Monitor Institute, he worked in Deloitte's Customer & Marketing practice and supported clients in developing growth strategies and customer experiences across sectors. Tej graduated from Boston College with a BA in Economics and International Studies, with a concentration in Comparative Identity Studies. He currently lives in New York and has lived in Mumbai, Amsterdam, Boston, and Dublin. Outside of work, Tej spends his free time either traveling or, when at home, hopping around all that New York has to offer – from concerts to museums to restaurants.

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Stakeholders (continued)

Jeff Morshed :

Core Team Member ~ Jeff is strongly committed to giving voice to underprivileged communities that have historically lacked political or socio-economic agency. Before joining Deloitte, he was a middle school teacher with Teach for America and a member of the International Crisis Group's United Nations Advocacy team. At the firm, Jeff has worked in the US and the Middle East, focusing primarily on public sector and social impact work related to local governance, workforce development, and transportation. He has co-authored a thought leadership piece entitled "Winner takes all: The race to adopt an integrated approach to work creation in the future age of work," which was published in the 2018 World Government Summit Knowledge Hub. Jeff is a native of New Jersey, but has bounced around different countries such as Bangladesh, the UK, Oman, and Saudi Arabia. He has graduated from Georgetown University and Princeton University, studying international relations and Near Eastern politics/history. As a result, he is keen to bring a global perspective when addressing social impact problems. Outside of the office, Jeff is likely to be spending time with his wife and son, playing/watching basketball and soccer, learning different languages, or reading about different faiths and cultural traditions.

Lisa Newman-Wise :

Core Team Member ~ Lisa Newman-Wise thrives on connecting unlikely partners and unusual ideas to tackle seemingly impossible challenges. Lisa spent her first fifteen years living abroad which left her with both a love for constant learning and a deep desire to help rectify the economic, education, and environmental disparities she witnessed as a global nomad. Over the past decade, she has worked on equity issues in the public, private, and non-profit sectors and has developed a flexible approach to leadership, coaching, facilitation, and execution to most effectively serve the circumstances. From the National Outdoor Leadership School to the US Air Force, to the Stanford Graduate School of Business, and now at Monitor Institute by Deloitte, she has built a strong commitment to making good ideas better and seeing them through to execution. When taking a break from figuring out how to make the world more equitable, Lisa can usually be found exploring her new hometown of Washington DC with her family, practicing yoga (and patience), or searching for ways to consume less and share more.

Tracie Neuhaus :

Core Team Member ~ Tracie relishes working with passionate and driven leaders to help them develop innovative solutions and blaze new paths for tackling some of society's biggest problems. She draws upon over 15 years of experience working across the for-profit and non-profit sectors, both domestically and abroad. With the Monitor Institute by Deloitte, she advises leaders of foundations and nonprofits on issues related to strategy, growth, and operational effectiveness, with particular experience in the fields of workforce development, youth development, and education. Tracie has an undergraduate degree from Georgetown University and an MBA from the Wharton School at the University of Pennsylvania. Before joining the Monitor Institute by Deloitte in 2011, Tracie spent several years as part of Monitor Group's commercial practice in Europe, consulting clients in the life sciences and consumer goods sectors. She started her career as a financial analyst, contributing to her interest in organizations operating at the intersec-

tion of the business and social sectors. Based in San Francisco, Tracie can be found most often in the mountains—either skiing or hiking—or off discovering a new country, culture, or cuisine.

Amanda Olsen :

Core Team Member ~ Amanda believes in the power of collaboration to solve the world's most complex social problems. She has consulted for numerous nonprofits and foundations, with experiences ranging across strategy, operations, and organizational transformation. Amanda has a deep passion for education and has a love for travel and has gone on numerous volunteer trips to consult social entrepreneurs across the globe. Her prior work at Deloitte focused on helping executives at the world's largest retailers and consumer product companies find their greatest collective wisdom through joint strategic planning efforts. Amanda graduated with highest honors from the University of Illinois Urbana-Champaign with a dual degree in Finance and Marketing and earned an MBA and a certificate in Public Management and Social Innovation from the Stanford Graduate School of Business. At Stanford, Amanda was professionally trained as an executive coach and also took numerous classes at the design school, where she found that her biggest "ah-has" often come when putting herself directly in the shoes of the person she is trying to help.

Amy Silverstein :

Core Team Member ~ Amy's work with corporate clients supports them in rationalizing their CSR strategies and employee engagement efforts and draws on her 15 years of experience in consulting and Corporate Responsibility. Through this work, Amy helped establish Deloitte as a leading corporate citizen by spearheading a series of innovative initiatives including the development of Deloitte's groundbreaking National Pro Bono Program. The program resulted in a six-year \$100M commitment, White House recognition, multiple client inquiries, and significant public accolades. This experience has also proven valuable in advising social sector organizations looking to work closely with companies on a shared social impact agenda. She has an MPP from the University of Illinois at Chicago.

Jen Smith :

Core Team Member ~ Jen is passionate about building bridges between education and meaningful employment. She is particularly interested in how to work across the public, private, and non-profit sectors to support children and families. Jen believes workforce development and social entrepreneurship have a big role to play in improving the lives of those most vulnerable in our society. Prior to joining the Monitor Institute, Jen worked in Deloitte's Strategy and Analytics practice, focusing on market growth and the social determinants of health. Jen began her career at Teach for America as an eighth grade English teacher, where she also taught English as a Second Language and Special Education. During her time with TFA, she worked as the Director for Teacher Leadership Development, where she coached teachers on instructional best practice, leadership, and intersectional identity development. She is proud to have led TFA's expansion to rural Oklahoma, where she grew up.

Avon Swofford :

Core Team Member ~ Avon manages the day-to-day business of Monitor Institute by Deloitte. Her skills include project design

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Stakeholders (continued)

& management, financial management, grants management, and systems design, development and implementation. Avon has more than thirty years of experience in the social sector, where she has played both programmatic and financial management roles in national and international foundations and nonprofits. She served as an associate program officer at the Packard Foundation and was a program officer for the Skoll Foun-

dation, where she helped develop and launch the Skoll Awards for Social Entrepreneurship. Avon was raised in the Appalachian Mountains of North Carolina, graduated from Duke University with a B.A in English, and is an experienced writer and editor.

Vision

Progress on pressing issues

Mission

To surface and pioneer breakthrough approaches for societal challenges

Values

Next Practices

Impact

Thought Leadership

Innovation

Philanthropy

Change Management

Analytics

Digital Capabilities

Social Change

1. Adaptive Strategy

Design strategies for a rapidly evolving world

Stakeholder(s)

Foundations

Nonprofits

Networks

Designing flexible strategies for a rapidly evolving world ~ In an increasingly turbulent world, the old centralized approach of “make a plan and stick to it” is no longer effective: static strategies fail to align with changing conditions. Instead, organizations that aspire to make a significant and sustainable social impact should embed adaptive strategies by “setting a direction and testing to it.” | What we offer ~ We have worked with dozens of foundations, networks, and operating nonprofits to help increase their impact by designing and implementing an adaptive strategy for their organization: one that provided clarity of direction while emphasizing ongoing learning. We treat the whole organization as a team that is experimenting its way to success—an approach that is equally effective for innovative new start-ups and established organizations who are re-inventing themselves for an increasingly connected, technology-enabled world. To provide structure to this fluid approach, we focus on answering a series of four interrelated questions about the organization’s strategic direction: what vision you want to pursue, how you will make a difference, how you will succeed, and what capabilities it will take to get there. The answers to these questions provide powerful strategic guardrails for an organization while giving it enough freedom to learn, adapt, and grow. Particular areas of focus:

1.1. Clarification & Alignment

Clarify and align on solutions to social problems

Clarifying and aligning on underlying drivers of and potential solutions to the social problems an organization is tackling, and, where the organization should (and should not) focus

1.2. Aspirations & Practicalities

Build connections between aspirations and practical considerations

Building strong connections between the organization’s strategic aspirations and the practical considerations required for successful implementation

1.3. Implementation

Design implementation strategies

Designing strategy for successful implementation: alignment within the organization’s staff and integration of strategic thinking into the team’s everyday decisions

2. Aligned Action

Identify leverage points to drive systemic change

Organizing for system change ~ Aligned action is a problem-solving approach to address “wicked problems”—complex challenges that have multiple root causes, are emergent and shifting, defy single point solutions, and require a portfolio of interventions to affect change. We help identify the highest impact leverage points to drive systemic change and design the most effective network structure to catalyze collective impact—supporting a group in achieving what no one entity could effectively do on its own. | What we offer ~ We help frame, design, and orchestrate coordinated action that can accelerate impact. Particular areas of focus include:

2.1. Engagement

Engage stakeholders to build sustainable solutions

Human dynamics: Engaging the stakeholders needed to build solutions and make them stick. We believe that change happens through relationships that are based on trust. We have literally written the book on designing and facilitating strategic conversations to help galvanize diverse stakeholders and mobilize them behind a shared intent and coordinated plan for action, GATHER: The art and science of effective convening.

2.2. Strategies

Design strategies to support coordinated interventions

Collective strategy: Getting smart about the problem and arriving at a point of view and action agenda for the network. There is no single solution to any of the wicked problems we face. We help design strategies that support a portfolio of coordinated interventions.

2.3. Networks

Design networks to support impact

Network configuration: Designing a network to support impact. We know there is no one-size-fits-all approach to network development. Networks are dynamic and the supports they need change over time. We understand the activities and roles typically involved in moving a group through the six stages of network development—and have outlined this process in the online resource, ENGAGE: How funders can support and leverage networks for social impact.

3. Corporate Social Impact

Design business strategies for social progress

Stakeholder(s)

Businesses

Employees

Companies

Customers

Designing business strategies for social progress ~ Business success hinges on more than profits. Increasingly a brand's relevance and appeal—for consumers and talent alike—is connected to its action on pressing social issues. As a result, companies face the growing challenges of prioritizing and organizing their social impact and sustainability activities to make measurable impact while aligning these activities with other business goals. | What we offer ~ Monitor Institute by Deloitte can work with a company to help it achieve alignment of its need for profit and for purpose. In our work, we balance the many inputs and demands a company faces, to shape an impact strategy specific to its market and stakeholder needs. Particular areas of focus include:

3.1. Measurement & Evaluation

Measure success and evaluate results

Establishing ways to measure success and evaluate results, beginning with how the organization prioritizes specific measures. Analyzing data to gauge the organization's early progress in achieving its intended impact(s), offering recommendations on where adjustments could increase the organization's impact

3.2. Piloting/Testing

Piloting/testing chosen approaches to refine models and build evidence

Piloting/testing the chosen approach to refine the model and build evidence, engaging key stakeholders in the adoption and delivery of the new impact strategy

3.3. Capabilities & Resources

Analyze the capabilities and resources needed to implement an impact strategy and how to configure them most effectively

Analyzing the capabilities and resources needed to implement an impact strategy and how to configure them most effectively. This may involve organizational design and developing the governance structure, and rationalizing existing activities around the new structure

3.4. Culture & Values

Determine the appropriate path for greatest impact based upon organizational cultures and values

Working from a company's culture and values to determine its appropriate path for greatest impact, whether that involves deciding a signature issue or structuring a portfolio of activities. May involve competitor research, social listening, and/or interviews with experts

4. Education

Guide new paths to student success

Stakeholder(s)

Students

Educators

Guiding new paths to student success ~ Data offers educators an unprecedented ability to tailor interventions to a student's needs and adapt the learning experience to improve student success. The education system has yet to meet its full potential in harnessing new technology and data-driven approaches that can transform how skills are developed and students are prepared for the future. | What we offer ~ Public education is widely recognized as a powerful intervention point for addressing many systemic social challenges. We in Monitor Institute by Deloitte work with our clients to help reinvent what is thought of today as public education. We've worked on over 40 social impact projects in the education space, many in collaboration with leading colleges and universities, foundations, nonprofits, and government entities. In our work, we seek to:

4.1. Interventions & Capacities

Scale up interventions and institutional capacities

Scale up interventions and institutional capacities that innovate across all dimensions of teaching and learning while redefining holistic approaches to increasing student success

Stakeholder(s):

Students

4.2. Connections & Collaboration

Strengthen connections and collaboration

Use our skills as strategic conveners to strengthen connection and collaboration between K-12 and higher education institutions, between the public and private sectors, between funders and actors, and between teachers, parents, and students

Stakeholder(s):

K-12 Higher Education Institutions

Actors

Public Sector

Teachers

Private Sector

Parents

Funders

Students

4.3. Insights

Create a richer understanding of student archetypes and pathways

Apply Deloitte's insight tools to help create a richer understanding of student archetypes and pathways, with an eye towards identifying and removing potential barriers to success

4.4. Reach & Impact

Increase the reach and impact of breakthrough social entrepreneurs

Increase the reach and impact of breakthrough social entrepreneurs, and retool already at-scale organizations for the challenges of 21st century education

Stakeholder(s):
Social Entrepreneurs

4.5. Retooling

Retool already at-scale organizations for the challenges of 21st century education

Stakeholder(s):
Large Organizations

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5. Impact Measurement

Design measurement processes

Measuring up: Data for decision making ~ Society is at a moment of innovation and technological transformation that holds great promise in building a truly data-driven understanding of social impact—both at the level of individual organizations and initiatives, and at a more holistic level. Yet many organizations struggle to develop evidence-based practices and true learning organizations. We at Monitor Institute by Deloitte provide deep and extensive measurement experience at the intersection of pioneering strategy, adaptive learning, and innovation to address these challenges. | What we offer ~ Measurement should be in the service of decision making—from strengthening understanding of an issue, a geography, or a segment to gauging how well efforts are working to make those efforts more effective. Monitor Institute by Deloitte designs measurement processes that are in the service of real people making real choices. Our team will help you think purposefully and broadly about how best to use data to support your strategic goals. We use data to gain insight about and serve equitable goals, to change organizational cultures to promote inclusion, and to provide information and data tools for agency and choice of constituents and communities. We work to break down knowledge silos in the social sector, by taking advantage of new opportunities to better share information and develop collective knowledge at the scale of the problems we face. We can help you establish necessary feedback loops. Particular areas of focus include:

5.1. Systems

Ensure your measurement systems help you increase social impact

Monitoring, evaluation, and learning systems development: Designing for impact. We integrate measurement purpose with the culture and structure of your organization to promote continuous learning and ensure your measurement systems help you increase social impact.

5.2. Metrics

Use data for decision making

Measurement frameworks: Using data for decision making. We help you develop approaches for program improvement and assessment, drawing on the latest innovations in organizational learning, technology, and behavioral design.

5.3. Learning

Develop dynamic practices and tools for adaptive strategy

Strategic learning: Developing dynamic practices and tools for adaptive strategy. We help create measurement systems that support the testing of assumptions, emergent and ongoing learning by doing, and adaptation to external change.

5.4. Data

Simplify data complexity

Complex data challenges: Simplifying complexity. We help you tackle demanding data issues, including how to learn across multiple organizations, promote innovation, and address system-level change, as well as effectively use data analytics and data visualization.

6. Philanthropy

Prepare funders for what's next

Stakeholder(s)

Funders

Donors

Foundations

Intermediaries

Networks

Preparing funders for what's next ~ As the world changes at breakneck speed, philanthropy is changing too. Leading funders are testing new approaches but are often constrained by models that remain largely unchanged from a hundred years ago when pioneers like Andrew Carnegie and John D. Rockefeller created the first foundations. We help funders chart new courses—for the field of philanthropy as a whole, and for implementing their own strategies. | What we offer ~ We work with foundations, networks, donors, and intermediaries to pioneer new models of philanthropy and stay on the leading edge of change. We help them adapt to the rapidly shifting context inside and outside the field, collaborate more effectively with others, tap productive market-based approaches, and modernize their operating models to fit emerging new realities. We also work with innovators outside traditional philanthropic circles to build innovative networks and coalitions, develop new intermediaries, create new tools, and advance creative uses of financing such as impact investing, enterprise philanthropy, and social impact bonds. Particular areas of focus:

6.1. Thought Leadership

Pioneer what's next for the field

Pioneering what's next for the field:

6.1.1. New Directions

Chart new courses in social change

Working with leading funders to figure out what's next for philanthropy—charting new courses in social change including impact investing, social innovation, and impact measurement

Stakeholder(s):

Leading Funders

6.1.2. Place-Based Change

Build new platforms for place-based change

Building new platforms for place-based change through work with community foundations, United Ways, and other community-based philanthropy organizations—we've literally written the book on what's next for community philanthropy

Stakeholder(s):

Community Foundations

**Community-Based Philanthropy
Organizations**

United Ways

6.2. Adaptation

Adapt to new realities

Adapting to new realities:

6.2.1. Strategies

Create effective and adaptive strategies

Working with individual foundations to create effective and adaptive strategies that help them get on their front foot in a rapidly changing community and global context

Stakeholder(s):

Foundations

6.2.2. Structures, Processes & Systems

Modernize organizations

Modernizing organizational designs to create more nimble institutions through new structures, processes, and internal systems

6.2.3. Programs & Initiatives

Design new programs and initiatives

Designing new programs and initiatives from the ground up in a way that combines rigorous data-based decision-making with an inclusive process that builds internal alignment

7. Social Innovation

Pioneer new ideas to meet pressing social challenges

Stakeholder(s)

Funders

Social Entrepreneurs

Pioneering new ideas to meet pressing social challenges ~ For many funders and nonprofits seeking to solve complex and pressing social problems, there is a need to innovate: to seek out and experiment with new ideas that have the potential to create breakthrough change. But philanthropists and social sector leaders aren't often clear about what innovation really means for them and their organizations, much less how to intentionally and consistently make it happen. | What we offer ~ The convergence of dynamic forces—such as new and emerging technologies, new ways of connecting people and organizing work, and new ideas from around the world and across sectors—is creating exciting opportunities for breakthroughs in how public problems are solved. Monitor Institute by Deloitte helps funders and social entrepreneurs make sense of leading-edge innovation theory and practice, translating recent advances in commercial innovation strategy for social sector success. Particular areas of focus include:

7.1. Funding

Fund breakthrough ideas

Funding breakthrough ideas. Deliberately finding and funding transformative ideas involves different processes, systems, and structures than more traditional grantmaking (as detailed in our Stanford Social Innovation Review cover story on the “Re-emerging Art of Funding Innovation”). We help philanthropic institutions and individuals interested in funding breakthrough social innovation develop more intentional approaches for sourcing, selecting, supporting, measuring, and scaling breakthrough ideas.

7.2. Approaches

Develop new approaches

Challenging existing orthodoxies to develop new approaches. Every organization has its share of orthodoxies—deeply held assumptions about “how things are done” that may or may not still be true, but that often go unstated and unchallenged and can become blind spots over time. We work with funders and nonprofits to identify unproductive orthodoxies, challenging these calcified practices and processes when necessary and creatively re-imagining new and more effective ways of accomplishing organizational goals.

7.3. Innovation

Craft innovation portfolios

Crafting innovation portfolios. For some nonprofits and social entrepreneurs, creating innovative ideas is the easy part, but managing them is the challenge. More often than not, this web of ideas turns into a frustratingly chaotic array of products and innovations that aren't always well aligned with an organization's mission and theory of change. We work with social sector leaders to help make sense of their existing innovation portfolios, rationalize their investment in new offerings and services, and set up new efforts for success.

8. Workforce Development

Close the skills gap

Closing the skills gap ~ Across the country, there are millions of people who are working but still struggling to get ahead. At the same time, employers are trying to fill millions of job openings, with many citing an inability to find workers with the right skills. This "skills gap" is a challenge for everyone. Employers face lower productivity and higher recruiting costs while many workers are forced to settle for low-skill, low-wage work that can't support their families. But there are emerging opportunities for impact, many of which focus on "middle-skill" roles where workers can earn living wages—but without the time and expense of a four-year college degree. | What We Offer ~ We work with foundations, nonprofits, and corporations to help bridge this skills gap, enabling job seekers to access in-demand, well-paying careers and employers to tap into new and diverse sources of talent. We do this by:

8.1. Strategy & Operations

Provide customized strategy and operational planning support to help clients surface and scale workforce and employment solutions

8.2. Barriers, Gaps, Opportunities & Solutions

Research the latest barriers, gaps, opportunities, and solutions across the workforce and employment ecosystem to inform decision-making

8.3. Meetings

Design and facilitate high impact meetings that bring together stakeholders from across the ecosystem to learn, connect, and explore collaborations

8.4. Training & Learning

Design, implement, and scale innovative training and learn-and-earn programs

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